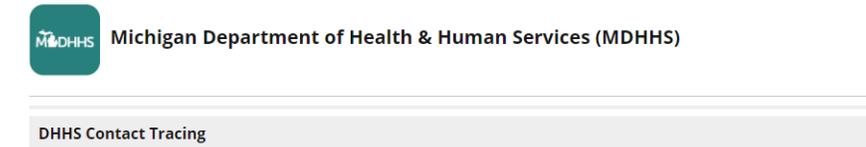


Running Daily Reports from Traceforce

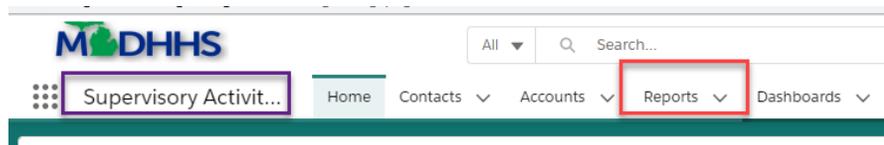
Part 1: Finding the Report in Traceforce

(A folder, in Contact Tracing, has been created with reports for your LHD. You can save other reports in this locations if you choose.)

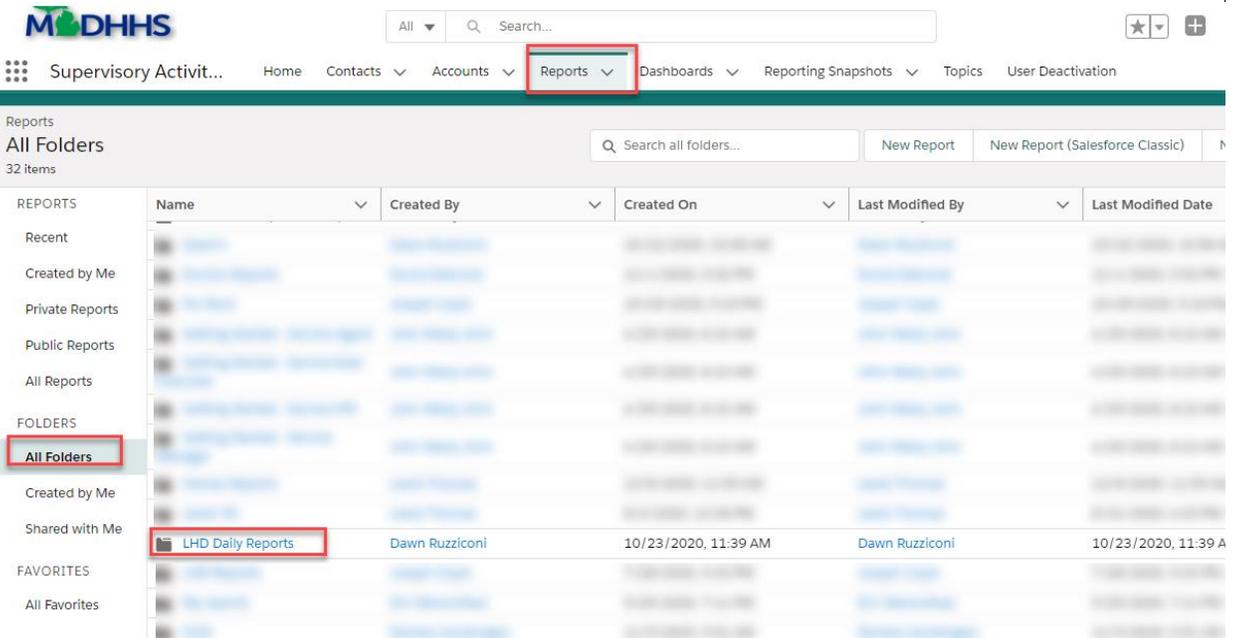
Step 1:
Sign into
Traceforce
/Contact
Tracing



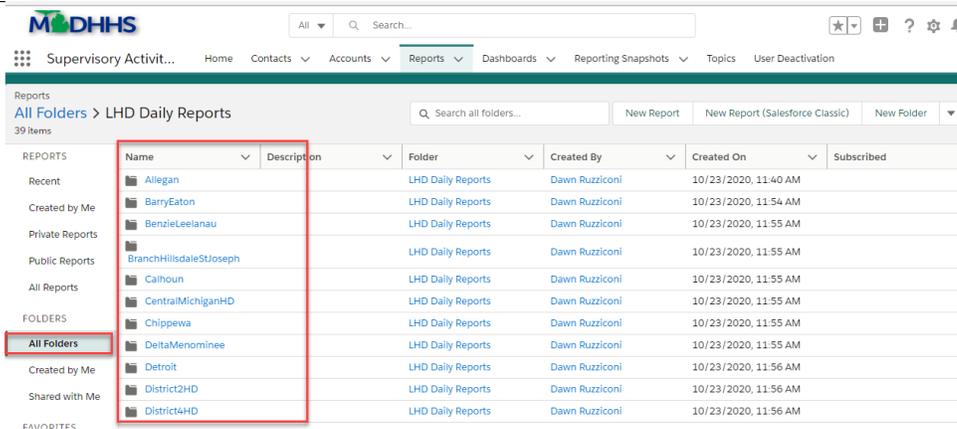
Step 2:
Click on
the
"Reports"
tab (must
be a
Supervisor
to access
Reports)



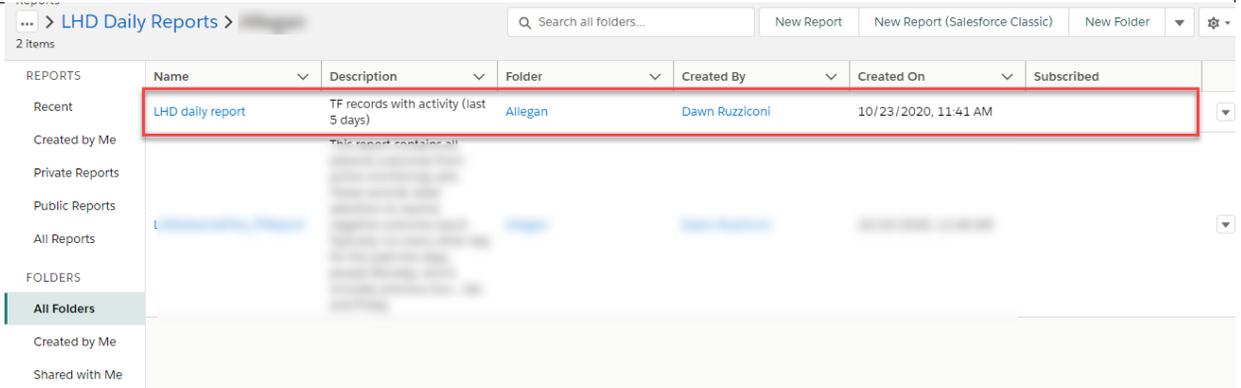
Step 3:
Navigate to
All Folders
> folder
named "LHD
Daily
Reports"



Step 4:
 Open the folder LHD Daily Reports > navigate to your LHD.
 Open the appropriate folder



Step 5:
 Open the Report "LHD Daily Report"



Part 1 is complete.

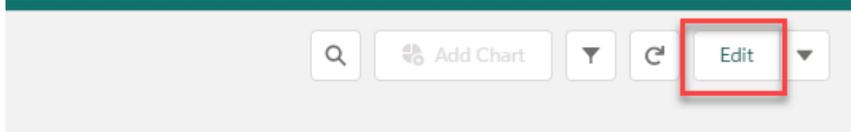
You have now navigated to the location of the report, proceed with the next steps for creating & running the report.

Continue to Part 2 to create, run & save the report

Part 2: All Assessment Daily report (editing, saving, and exporting)

Step 1:

Click on the **edit** button on the upper right side of the table header

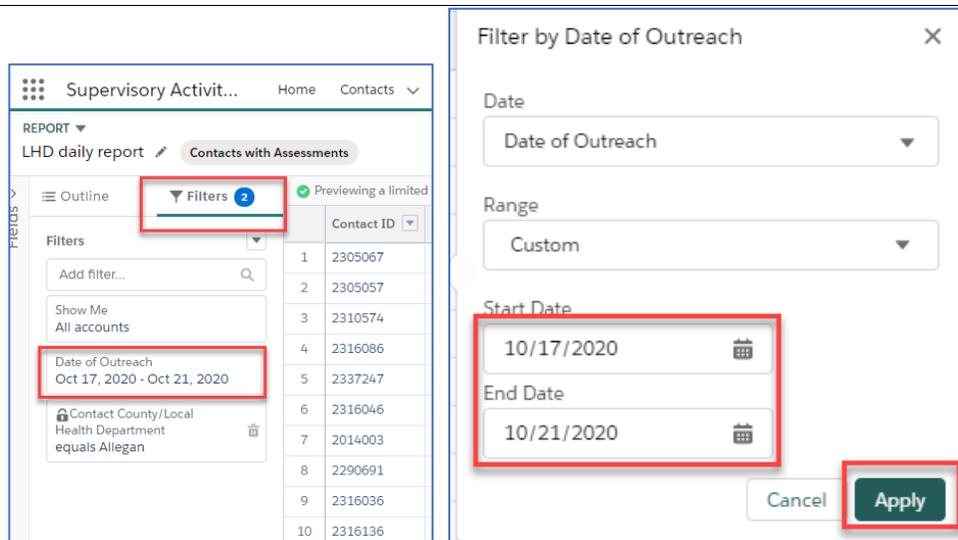


Step 2:

Once the edit panel opens, **click on the "filters" tab.**

Change the **"Dates of Outreach"** (and click apply).

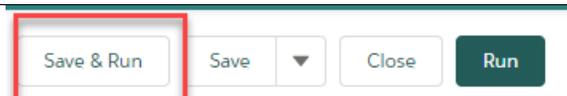
Note:
Typically, the previous 5 days is queried

A screenshot of the 'Supervisory Activities' interface. The 'Filters' tab is selected and highlighted with a red box. Below it, a table lists contact IDs. A dialog box titled 'Filter by Date of Outreach' is open, showing 'Date of Outreach' set to 'Date of Outreach', 'Range' set to 'Custom', 'Start Date' set to '10/17/2020', and 'End Date' set to '10/21/2020'. The 'Apply' button in the dialog is highlighted with a red box.

Filter	Contact ID
1	2305067
2	2305057
3	2310574
4	2316086
5	2337247
6	2316046
7	2014003
8	2290691
9	2316036
10	2316136

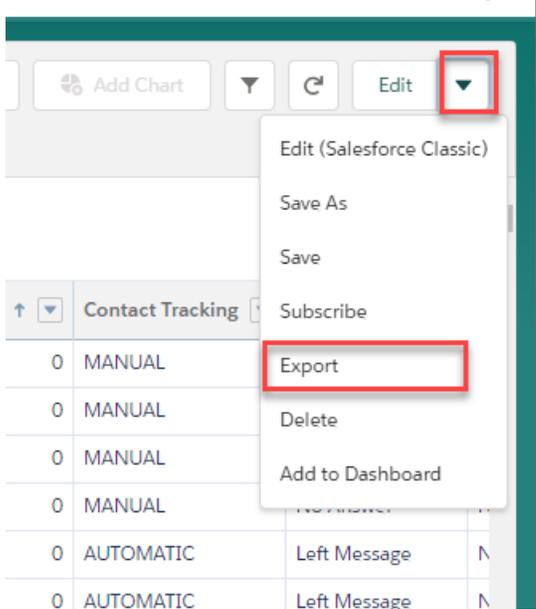
Step 3:

Click on the **"Save & Run"** button in the upper top right of the table header



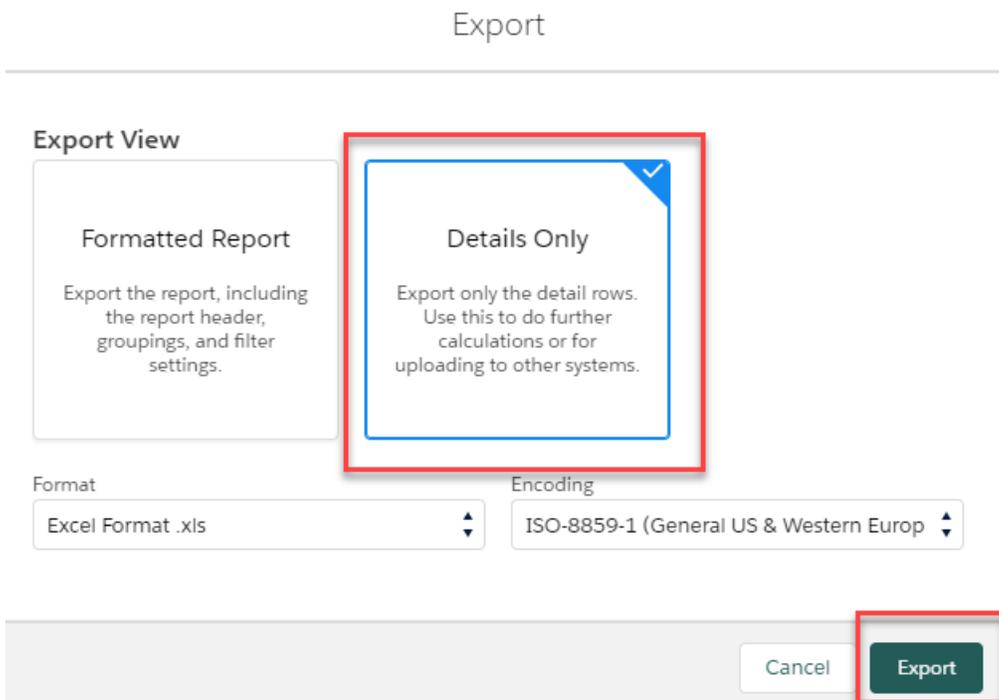
Step 4:

Export the report as an excel file by **Clicking on the drop-down arrow** next to the **Edit** button, then choosing **“Export”**



Step 5:

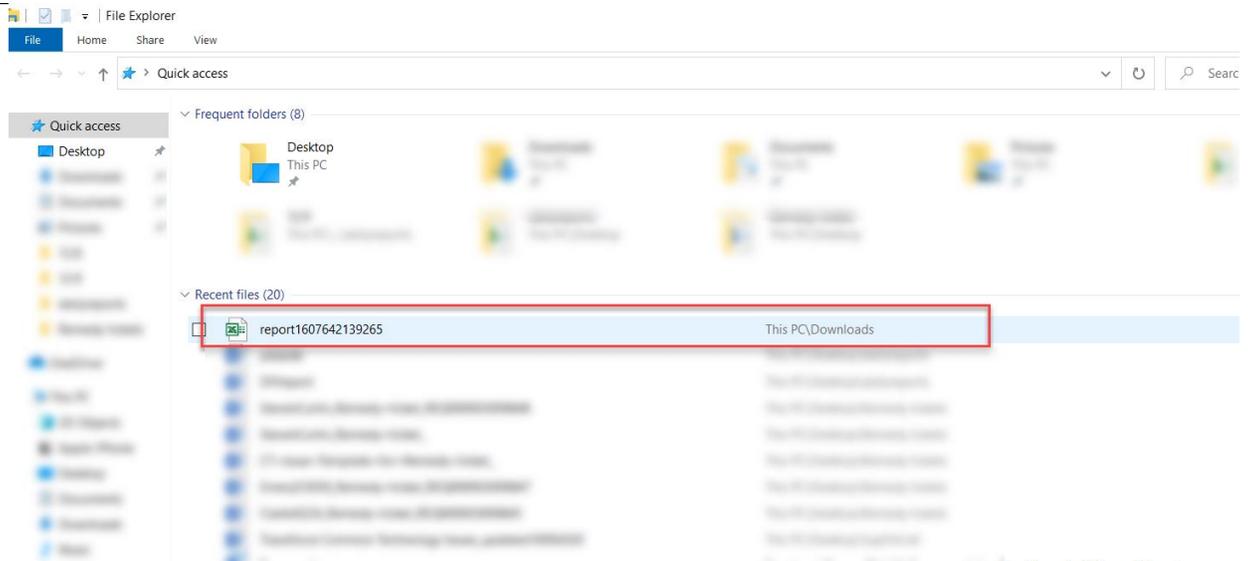
Choose to **export Details Only**, then **Export**



Final step:

Save and/or rename the **Excel file** to your computer. *(these exported reports will not be saved in Traceforce).*

*Save file as as a .xls file, not the default of .html



Part 2 is now complete